

Correspondence Template User Guide

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Correspondence Pod User Guide *Version 1.0*

Overview

This guide will walk you through building templates for your processes. It covers the operation of the Correspondence Administration and Correspondence Template processes.

For information on integrating the templates into your procedures, please refer to the Technical User Guide.

There are 2 main elements in the Correspondence Pod, the Correspondence Admin dashboard and the Correspondence Template procedure.

The correspondence Admin Dashboard provides access to the following functionality

- View all the templates defined in the system.
- Create new Correspondence Template.
- Select Template for update.
- Define standard Paragraphs.
- Configure the Correspondence Types.
- Configure the Delivery Methods.
- Configure Admin tables.
 - Language with associated default formats.
 - Correspondence Groups.
 - Correspondence Control Settings.

The Correspondence Template provides the following functionality

- Definition of the template.
- Create email, Letter and document templates.
- Edit text and HTML templates with HTML editor plug in.
- Process to define, authorise and release the template.
- Test Email and Letter creation.
- Authorise Templates

An additional procedure, Correspondence Example, provides a working example of the procedure interacting with the templates. See the Technical User Guide for an explanation of how this works.

Conventions

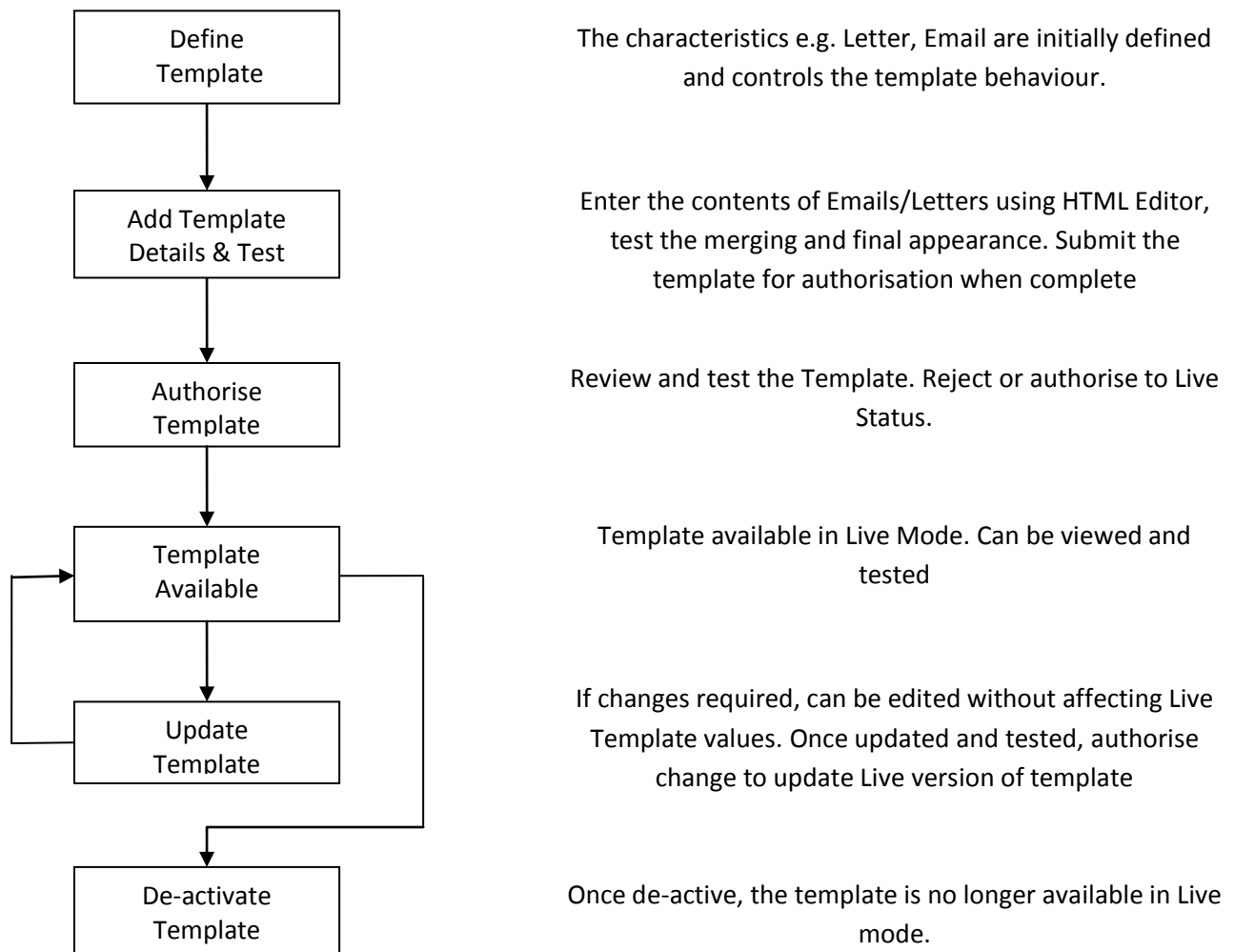
[button] - a button on the screen

‘option’ – an option available in a radio button or drop down field.

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Template Process Flow

The template process has defined stages to allow the definition, authorisation, utilisation and retirement of a template. At each stage you can view the template and details also test the template with real data and create output in a temporary area.



It's important to note that the template cannot be used until in the Live environment. Once there, changes can be made to the template without affecting how the template is working in Live. This allows changes to be saved, reviewed and tested prior to moving to Live.

Correspondence Admin Console

Template Dashboard

The dashboard allows you to manage your templates. You can filter the list to find the appropriate templates or press the [Template] button to create a new template.

Correspondence Admin

Templates

Correspondence: [Templates] [New Template]

Components: [Standard Paragraphs]

Configuration: [Delivery Method] [Correspondence Type] [Other Configuration] [Exit]

Template Name: [] Correspondence Group: [] Delivery Method: [] Language: [] [Filter List]

Status: [] Map Name: [] Stage Name: [] Associated Key: []

Correspondence Templates. Click on a row to open the template for viewing or editing.

Ref	Group	Deliver By	Template Name	Auth	Status	Language
Corr0002	Correspondence Example	Auto Send Email	Auto send Acknowledgement	Updating	Update Template	English
Corr0006	Correspondence Example	Auto Send Email	Auto Send Request for copy of database tables	Live	Active Template	English
Corr0004	Correspondence Example	Auto Send Email	Auto Send Request for more environment information	Live	Active Template	English
Corr0008	Correspondence Example	Auto Send Email	Flight Offer Email	Live	Active Template	English
Corr0017	Correspondence Example	Create PDF Document and Auto Print	Media Covering Letter	Live	Active Template	English
Corr0020	Correspondence Example	PDF Letter on Email	Licence Letter	Live	Active Template	English
Corr0014	Correspondence Example	Review Email prior to Send	Send Solution details	Live	Active Template	English
Corr0015	Correspondence Example	Review Letter prior to Printing	Product Overview Letter	Live	Active Template	English

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Terminology

Correspondence Group This value, maintained via the [Other Configuration] screen, allows you to group your templates by areas of the system. If there are several procedures running Human Resource functions, you can create a 'HR' group.

Correspondence Type How the Correspondence is constructed and template type. See the admin screen for a list of options.

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- Delivery Method** What happens once the correspondence has been created based on Correspondence Type e.g. Auto Send email.
- Language** The templates are all assigned a Language, so duplicate templates can be created for each language your procedures support. All the labels are in English, but the Standard Paragraphs used will match the language.
- Auth** The templates start in Draft, where they can be created and tested. They are Submitted for authorisation. If the Author has the authorisation role, they can also authorise the correspondence. Only 'Live' templates are available to be used by the other Metastorm procedures. If no longer required the template may be reactivated and finally deleted.
- Status** Is the stage the Template is current at and similar to the Auth, but allows Live Templates to be updated while the previous version is still available in Live.
- Map Name** Each Template is assigned to a Metastorm Map, which is used to load the Folder related data that may be merged in to the correspondence.
- Stage Name** In the Metastorm Procedure, which templates to offer can be determine by listing those applicable to the stage, Stage/Action, Key or Stage/Key. More about this when setting up a template.
- Associated Key** see stage name.

To select a template, click on the row.

Template Stage Options

When opening an existing template the actions available will change depending on the stage.

Draft Stage

Template Contents – open a page of menu options, see later for list which includes testing.

Submit – Once the template has been created and tested, it can be submitted for authorisation.

Copy Template – create a new template based on this template

Authorise Template

Authorise – Move the template to 'Live' status allowing it to be used to create correspondence. A comment may be added.

Reject – Return the Template to 'Draft' status with a note.

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Test Email/Letter – Using the test screen merge data from existing source records to see the results

Active Template

De-activate – de-activate the template so it is no longer available for creating correspondence.

Update Template – use this option to move the template to Update status so it may be updated. A comment is required about why the template is being changed. The template may still be used in Live with the existing format by clicking the check box. It is important to check the box where a specific template is used.

Test Email/Letter – Using the test screen merge data from existing source records to see the results. This does not create documents in the live document directory, or send the email to the recipient email user.

Update Template

Template Contents – open a page of menu options, see later for list which includes testing.

Submit – return the template to live status, updating the previous live template with the new version. A comment may be added.

De-activate – de-activate the template so is no longer available for creating correspondence.

De- active Template

Re-activate – return the template to Draft status. The template will need to be re-authorised.

Delete – Archive the Template.

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Create a New Template

On pressing the [New Template] button, you are presented with the following screen. This controls how the template will be created, merged and delivery options. Some options are critical to the Merge Process and once this screen has been submitted, are locked.

The screenshot shows a web browser window titled "Define (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM - Windows Internet Explorer". The main content area is titled "Correspondence Template Details".

Template Name: Application Letter Response

Long Description: Letter to applicants thanking them for their interest

Corres Group: Correspondence Example

1) Correspondence Type

Corres Type: HTML Document

Template Type: Letter

Field Prefix: [] **Suffix:** []

Paragraph Prefix: { } **Suffix:** }

These values are used by the system to create pieces of unique text which can be replaced by Field content or standard paragraphs. They may be different if the correspondence uses HTML.

2) Related Source Folder

Map Name: corCorrespondenceExample

Table Name: corCorrespondenceExample

Used to determine which template(s) to use in your process, associate the template with any of the following

With Key: ApplicationResponse

with Stage: Request

with Action: Test Letter Select

3) Delivery Method

Specify if this Correspondence will be available as a Letter and or Email. If Letter, specify if it is to be printed in house or outsourced.

Delivery Method: Create PDF Document and Auto Print

Auto Send Email: No

Auto Print Letter: Yes

4) Language

A separate template is required for each language if the same letter is to be provided in more than one language.

Language: English

Currency Symbol: £

Date Format: dd/MM/yyyy

Time Format: HH:mm

Number Format: #,###,###,##0.00

Buttons: Submit, Cancel

Footer: Version 1.0, Licensed To: Evaluation, License: 04HK-LV10-NTCF-BT01

Below is an explanation of each field and the options available.

Template Name - this identifies the template and is used for when the user selects the template. If you are creating a large quantity of templates, especially that require a User to decide which to use, may require a standard naming convention.

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Long Description - Helps to keep track of the function the template is fulfilling and may be displayed in a grid for the user to determine the appropriate template to use.

Corres Group - this is used to group templates into functional areas. More groups can be added via the [Other Configuration] button.

Correspondence Type * - Determines the type of template to be created (Email, Letter or Email/Letter), it also defines the contents of the correspondence body e.g. Text, Html or Raw Html and the standard prefix and suffix characters associated with this type of template.

Field Prefix * - When you add a field from the Metastorm procedure to be merged into the template, the field name is surrounded by these values. This enables the Merge process to find the fields to be replaced.

Paragraph Prefix * – similar to the Field Prefix/suffix, these characters surround any standard paragraphs that have been defined.

Map Name * This is the Metastorm Map that is associated with this Template. When creating the body of the correspondence, all the fields defined in that procedure are available to be merged into final correspondence. Once this screen has been submitted, this value cannot be changed. The Table Name field is shown for information.

Within the Map, different templates will be appropriate at different stages. The following 3 'Associate Values' are used to assist in selecting the correct Template.

With Key This is any text value e.g. 'Auto Acknowledgement'. It can be used in conjunction with the other associated values.

With Stage A list of the stages in the Metastorm Map to select from

With Action A list of Actions associated with the stage selected

Delivery Method – Once the Correspondence has been created it can be actioned in several ways. The delivery method assigns standard methods of delivery including auto Email and Auto print. These actions are executed once the correspondence has been created. The Auto Send Email and Auto Print Letter fields are updated by this field.

Language Based on the language selected, the default formats are displayed. These may be updated if required. More languages can be added via the [Other Options] menu button.

Currency Symbol - The currency in a Currency field is not merged with the Metastorm field value. The formatting may include a currency symbol or a 'Special.CurrencySymbol' merge field can be used, which will merge the language Currency Symbol.

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When updating the formatting of merged fields, example formats are displayed, but any c# related 'String.Format' value are available. These should be tested before moving the correspondence to live.

Date Format - This is the default format used to merge dates.

Time Format – This is the default format used to merge times.

Number formats – The default format used to merge numbers, which can include decimals, commas etc.

Once the details have been selected, press the [Submit] button to continue defining the template. The Correspondence Template Content screen is displayed.

Those fields marked with an asterisk *, cannot be changed once this screen has been submitted. If you need to make a change, you need to 'Copy' the template, and on this initial screen make the necessary changes. Be aware that your template may contain merge fields which are surrounded by the old prefix and suffix, which must be manually replaced.

Correspondence Template Content

Template Content (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM form - Windows ...

Correspondence Template Content

Template Name

Each component of the template must be checked and a test run before the template can be submitted into Live.

Build Correspondence Content

☐

☐

☐

Correspondence must be tested prior to submission.

Signatory

Signatory

Select 'Requestor' or a specific user whom this Letter/Email should always be signed by.

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Depending on the options defined in the Template Content screen is tailored to show the appropriate option buttons.

The check boxes by the buttons ensure that all relevant options are reviewed and the template is tested before the [Submit] Button is shown. Once all the relevant screens have been processed once, the template can be submitted for authorisation.

Signatory - when creating the final correspondence, an associated User's details are loaded and can be incorporated into the Correspondence. See Technical User Guide about fields etc). You can assign the

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signatory to be the requestor i.e. the person requesting the correspondence, or an individual User, i.e. department manager. In addition, the user name is passed to the merge process. This is used when creating automatic correspondence.

The user can have a scanned signature associated which is merged into the document at creation.

Press the 'Close' button to close the editing menu.

Edit Template Details

This screen allows you to update a few of the values defined in the initial screen. The other values cannot be changed since they will affect the operation of the template. If you need to change one of these values, I suggest you copy the existing template with the copy button, where you can change all the definition values and delete the old template.

Letter Production

Letter Production (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM form - Windows ...

Correspondence Template - Letter Production

Template Name

Letter Production

☒ Create PDF from HTML

☐ Create Text Document

☐ Create HTML Document

Formatted Address

[txtAddress2]
[txtAddress3]
[txtAddress4]
[txtPostcode]

For Letters, use this field to construct an Address based on your name and address fields. Any blank lines are removed before adding to the document.

To use place (Special.AddressFormat] into the letter

Save a copy of the Letter

FileName

Directory on Server
The directory is prefixed by the DirectoryOnServer value from the corControl table.

File Name Field
This field will be updated with the full file path and name

Print Letter

Default Network Printer

Auto Print Letter

Folder and Special Variables

[txtSaveCopy]
[txtSendEmail]
[txtServerDirectory]
[txtSuccessful]
[txtWebServer]
[Special.AddressFormat]
[Special.Random]
[Special.Today]
[Special.Now]
[Special.CurrencySymbol]

Folder and User Variables

[Folder.FolderName]
[Folder.StageName]
[Folder.MapName]
[Folder.Category]
[Folder.Originator]
[Folder.Subject]

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The Letter production screen defines what happens with the Letter/Document created. You have the following options:-

Letter Production – decide what type of document you wish to create, Text, Html or PDF from Html. Note only the PDF option can be printed via the POD.

Save a Copy – The correspondence Pod, by default creates the document in the Temporary directory on the server. If you wish to keep a copy, you can save one in a document hierarchy. In the above screen, there is a directory per MapName and a sub directory for each

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folderName. It could be a value that's common across several procedures. If the directory does not exist, the Pod will create it.

File Name Field – You may wish a field in your procedure to contain the full file path/name of the document, to allow opening via the browser. The filepath value can also be used to attach the document to a clip.

Print Letter – If you want to print the Document. This is only available for PDF documents. The printers are from the list of printers available to the Metastorm Engine Server.

Auto Print Once the Letter / document has been created, it will be printed on the default printer.

Formatted Address – this is a special field used to format address. In the example above, there are 4 address lines and one postcode line. The Pod will automatically make these fields optional and when creating the address, will remove any blank lines, and convert the text to Proper Case i.e. st. Johns ROAd becomes St. Johns Road. The postcode is capitalised.

To build the Address, there are 2 boxes on the left, the first contains all the Fields from the associated Metastorm Procedure. It excludes any fields prefixed by 'tmp' or 'chk' to make selection easier. Also those ending in 'Id' are excluded. Having standard prefixes on fields makes the selecting of values easier. At the bottom of this box are special values. These perform special replacements in your templates. See the technical User guide about extending this list.

Special.AddressFormat	replaced with the Formatted Address value above
Random	Creates a five character random number, useful for creating unique file names.
Today	Displays the current date
Now	Displays the current time
Currency Symbol	Displays the symbol entered on the template.

The second box contains Folder associated values and User associated values. The User's details are determined by Signatory field defined above. The Folder Id can be used to create links to open the respective folder. One of the fields in the 1st box is 'txtWebServer', which is used to build the link.

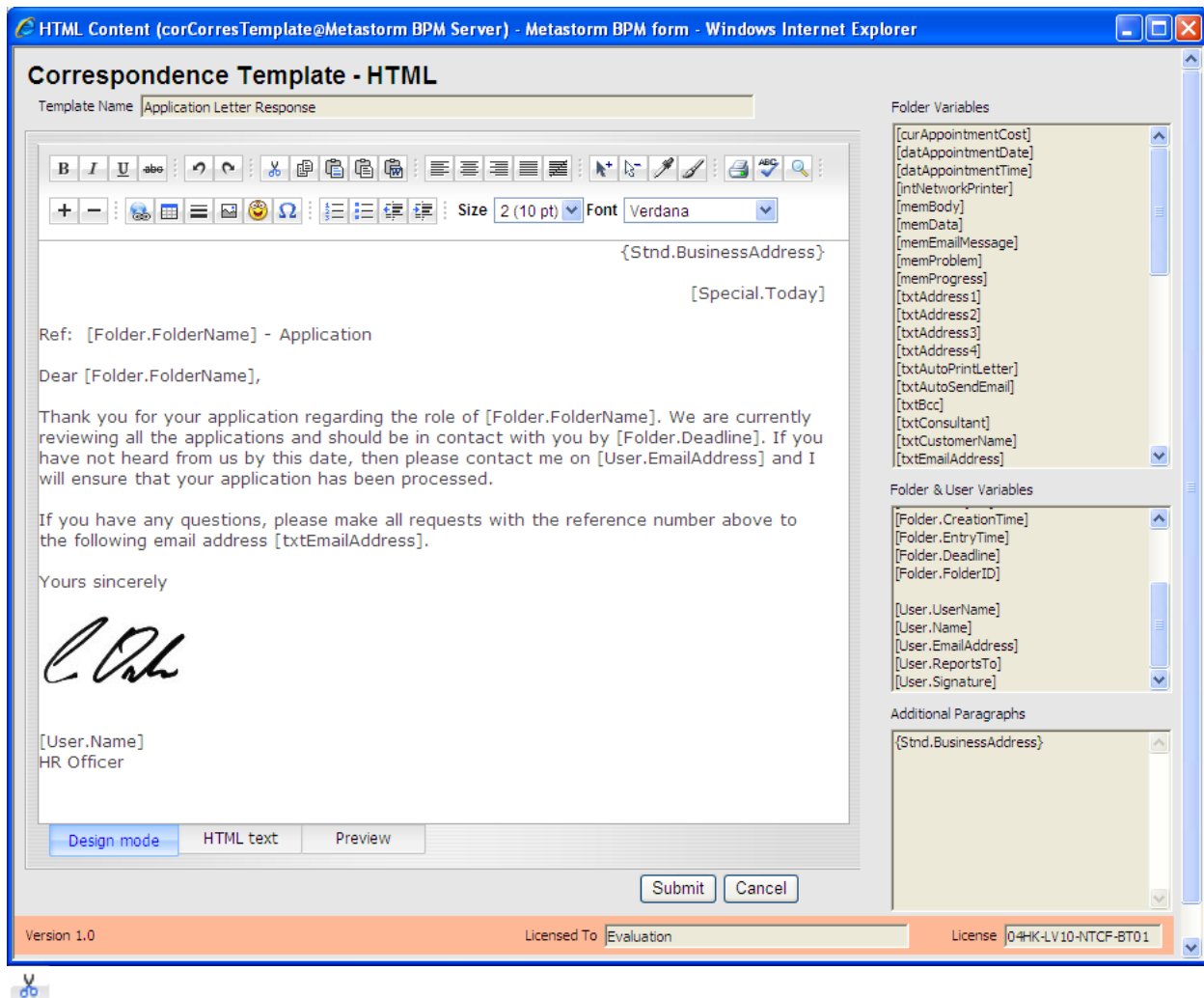
To use a value highlight the full value, which must include the prefix and suffix. This can be pasted into the 'Formatted Address' box.

Press [Submit] to confirm the values.

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HTML Screen

This screen allows you to enter and preview HTML.



The boxes on the Right are the same as those mentioned above. The additional Paragraphs box contains the standard paragraphs previously defined, in this example, the Business Address.

The user has a signature Jpeg file associated with their user details. Their signature was scanned and saved in the Signature directory on the web server (see Technical user guide). When the correspondence is built, the appropriate filename is replaced and the correct Signature is shown. When building the template the signature will appear as a red x in a box, since the signature file is only determined when the final correspondence is built.

The HTML editor has a number of buttons to format or add formatting to the correspondence. There are 3 tabs at the bottom which will display the following:-

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Design mode The screen above, the screen formats the screen. This may include formatting lines for tables and alignment.

HTML text Displays the actual HTML used to create the contents.

Preview Displays how the HTML will be rendered. Any images using the a webserver field i.e. signatures will appear as a red cross in a box. When the document is Tested, the URL will be resolved and the correct image displayed.

Once you have completed the document, press the [Submit] button to save your updates and return to the menu. Press the [Cancel] button to ignore any updates and return to the Menu.

	Bold (Ctrl B)		Print contents to default printer
	Italic (ctrl I)		Spell Checker
	Underline (ctrl U)		Preview document appearance
	Strike through		Text Colour
	Undo (ctrl z)		Text Highlight Colour
	Redo		Add a link e.g. web, mail
	Cut		Add a table
	Copy		Add a horizontal line
	Paste		Add an image
	Paste Text only – clears formatting		Add an emoticon. (See Notes)
	Paste from word, extracts extra formatting added by Word		Add a special symbol e.g. €
	Justify Left		Bullet
	Centre justify		Numbered list
	Right justify		Decrease Indent
	Fully justify		Increase indent

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	Remove justification	size	Change the size of text
	Select All	font	Change the font
	Select nothing		
	Coy Format		
	Apply Format		

The Emotions e.g. 🤔, 🤔, 🤔 are images on the Metastorm Server and can only be viewed by recipients with access to the Metastorm server.

Create URL Link

If creating a HTML document or PDF, you can create a link to a Web Page, file or mail recipient. To implement do the following:-

1. Highlight the text in the document you wish to be associated with the link
2. Click the  link icon.
3. First select the Protocol, some main options are:

HTTP: or HTTPS: Web pages including secure web pages

File: Link to a file the end-user has access to over the network.

ftp: Used to download files using File Transfer Protocol

MailTo: Used to open an email window to the recipient entered.

4. Enter the URL should conform to the standard, below are some examples:-

Web Site	http://www.FieldConsultancy.co.uk
Folder Link	http://[txtWebServer]/Metastorm/eFolder.aspx?FolderID=[Folder.FolderID] You will need a field with the Metastorm webserver. There are more options available, which are listed in the Metastorm Web Author's Guide.
Mail To	mailto:info@FieldConsultancy.co.uk

5. Optionally, enter a tooltip which is displayed when the user hovers over the link text

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6. Select if the link will appear in the Current, New , Parent or Top window. Generally use the New window option
7. Click 'OK' to confirm. You can test the link in the preview tab and see the actual HTML code in the 'HTML Text' tab.

Insert an Image

1. To insert an image click the  icon
2. Enter the URL location of the Image. e.g. <http://webserver/Images/image.jpg>
3. Optionally, enter text which will be displayed if the image cannot be rendered.
4. Add options for a shadow behind the image, the height and width with a link option so they are proportionally adjusted
5. Layout alignment, border and spacing between the image and the surrounding text.

To insert a signature use the following Image URL. Alternatively, this can be built as a field in the Metastorm procedure.

`http://[txtWebserver]/signatures/[User.Signature]`

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Define Email Detail

This screen defines the email header to be sent. The contents of the fields can be loaded from folder variables. The fields with a Red outline must be completed.

Correspondence Template - Email Detail

Template Name: Auto send Acknowledgement

To: [txtEmailAddress]

CC:

BCC:

From: [User.EmailAddress]

Subject: Acknowledge Support Call

Attachments:

☒ Yes ☐ No Automatically send email on Creation

Do you expect a response to this email and want the process to monitor?

☒ Yes ☐ No

Folder Variables

- [curAppointmentCost]
- [datAppointmentDate]
- [datAppointmentTime]
- [intNetworkPrinter]
- [memBody]
- [memData]
- [memEmailMessage]
- [memProblem]
- [memProgress]
- [txtAddress1]
- [txtAddress2]
- [txtAddress3]
- [txtAddress4]
- [txtAutoPrintLetter]
- [txtAutoSendEmail]
- [txtBcc]
- [txtConsultant]
- [txtCustomerName]

Folder & User Variables

- [Folder.FolderName]
- [Folder.StageName]
- [Folder.MapName]
- [Folder.Category]
- [Folder.Originator]
- [Folder.Subject]
- [Folder.CreationTime]
- [Folder.EntryTime]
- [Folder.Headline]

Additional Paragraphs

{Std.BusinessAddress}

Submit Cancel

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- To** the email address the email will be sent to. This may contain multiple addresses separated by a semi colon.
- CC** A copy of the email will be sent to these addresses. The recipient will see these addresses.
- BCC** A copy of the email will be sent to these addresses. The recipient will not see these addresses.
- From** The from address. If the [User.EmailAddress] is used, then the email of the signatory will be used. (see notes on Signatory above)

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Subject The title of the email.

Attachments List any files to be sent as an attachment with the email. The files must be on the Metastorm engine server in a suitable directory. See Technical User Guide.

If this is an Email Letter template, the document create (PDF, HTML or TXT) will be automatically attached to the email. There is an additional field 'Email Message', which is the body of the email sent with the attached document.

Auto Email If 'Yes', once the email has been created, it will be sent. This must be 'Yes', unless the user needs to preview/edit the email contents before sending.

Reply Expected – this field, and the working days to escalate are fields available to your Metastorm procedure, to enable escalation. They do not affect the template.

Press [Submit] once the screen has been completed.

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Raw HTML

This screen allows HTML to be designed in a commercial HTML editor i.e. CS3, normally by a graphics or marketing department. The raw HTML generated, which can include javascripts, stylesheets and other components, is pasted into this field.

Raw HTML (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM form - Windows Internet Explorer

Correspondence Template - Raw HTML

Template Name

Flight Offer Email

HTML to be copied in from external HTML Editor

```

<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"/>
<title>travelocity.co.uk</title>
</head>

<body bgcolor="#FFFFFF" style="border:0px; margin:0px;">

<table width="100%" cellpadding="20" cellspacing="0">
<tr><td>

<table width="600" align="center" border="0" cellpadding="0" cellspacing="0">

<!-- HEADER -->

<tr align="left" valign="top">
<td width="600">
<table width="600" align="center" border="0" cellpadding="0" cellspacing="0">
<tr align="left" valign="top">
<td width="600" height="87"><a href="http://www.travelocity.co.uk?source=crmkummn100128catch"></a></td>
</tr>
</table>
</td>
</tr>

<!-- NAVBAR -->

<tr align="left" valign="top">
<td width="600">
<table width="600" border="0" align="center" cellpadding="0" cellspacing="0" bgcolor="#00477f" background="http://cdn.lastminute.com/lmn/webcourier/en_GB/2008/08/11/travelocity/bg_nav.gif" style="background-repeat:no-repeat">
<tr align="center" valign="middle">
<td width="73" height="20" style="text-align:center;"><a href="http://www.travelocity.co.uk?source=crmkummn100128catch" style="text-decoration:none; color:#FFFFFF; font-weight:bold; font-family:Arial,Helvetica,Sans Serif; font-size:12px;">Home</a></td>
<td width="1" height="17"></td>
<td width="75" height="20" style="text-align:center;"><a href="http://www.travelocity.co.uk/site/travel/flights?source=crmkummn100128catch" style="text-decoration:none; color:#FFFFFF; font-family:Arial,Helvetica,Sans Serif; font-size:12px;">Flight Sale</a></td>

```

tmpNextForm

Template Content

Folder Variables

~#curAppointmentCost#~
~#datAppointmentDate#~
~#datAppointmentTime#~
~#intNetworkPrinter#~
~#memBody#~
~#memData#~
~#memEmailMessage#~
~#memProblem#~
~#memProgress#~
~#txtAddress1#~
~#txtAddress2#~
~#txtAddress3#~
~#txtAddress4#~
~#txtAutoPrintLetter#~
~#txtAutoSendEmail#~
~#txtBcc#~
~#txtConsultant#~
~#txtCustomerName#~

Folder & User Variables

~#Folder.FolderName#~
~#Folder.StageName#~
~#Folder.MapName#~
~#Folder.Category#~
~#Folder.Originator#~
~#Folder.Subject#~
~#Folder.CreationTime#~
~#Folder.EntryTime#~
~#Folder.Deadline#~
~#Folder.FolderID#~

Additional Paragraphs

~[Std.BusinessAddress]~

Submit

Cancel

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Text, links can be updated using folder variables to make them personalised. You will notice in the example above the Map and Folder variables have different prefix and suffixes. This is to ensure the prefix and suffix values do not affect the HTML code and visa versa.

Press [Submit] to save and return to the menu.

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Text Document

In the screen below, enter the text. There is no formatting available.

Text Body (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM form - Windows Internet Explorer

Correspondence Template - Text Body

Template Name: Text Document

Text Body

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Folder Variables

- [curAppointmentCost]
- [datAppointmentDate]
- [datAppointmentTime]
- [intNetworkPrinter]
- [memBody]
- [memData]
- [memEmailMessage]
- [memProblem]
- [memProgress]
- [txtAddress1]
- [txtAddress2]
- [txtAddress3]
- [txtAddress4]
- [txtAutoPrintLetter]
- [txtAutoSendEmail]
- [txtBcc]
- [txtConsultant]
- [txtCustomerName]

Folder & User Variables

- [Folder.FolderName]
- [Folder.StageName]
- [Folder.MapName]
- [Folder.Category]
- [Folder.Originator]
- [Folder.Subject]
- [Folder.CreationTime]
- [Folder.EntryTime]
- [Folder.Deadline]
- [Folder.FolderID]

Additional Paragraphs

{Std.BusinessAddress}

Submit Cancel

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Once complete, press [Submit] to save and return to the menu.

Merged Fields

After you have entered details into the template, any merged fields are extracted, including those from any standard paragraphs. Each field to be replaced is displayed, with details of where the field is sourced. A blank entry is from the source Metastorm procedure/map associated with the template.

Each field can have a format which is applied prior to being merged. Examples are displayed at the bottom of the screen.

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The 'Field must have a value' causes the merge process to check the values being merged to ensure they have a value. This stops letters emails being sent to people without email addresses, or without a date specified. If a value is not provided, then the value is displayed according to the default formats associated with the Template. These can be changed by updating Template Details.

Merge Fields (corCorresTemplate@Metastorm BPM Server) - Metastorm BPM form - Windows Inter...

Correspondence Template - Merge Fields

Template Name: Auto Send Request for more environment information

List of variables that may be replaced in the template. Click on row to change the format or mandatory requirement.

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Field Name	From Table	Apply format to field	Field must have a value
EmailAddress	User		Yes
FolderName	Folder		Yes
memProblem			Yes
Name	User		Yes
txtCustomerName		Proper	Yes
txtEmailAddress			Yes
txtProduct			Yes

Field: txtCustomerName

Field Format: Proper

Field Mandatory: Yes

If 'Yes', when creating the correspondence, if the field is empty, the merge will fail. This prevents required fields in the document being set to an empty space. If 'No' an empty space will be used.

Update Field

Set All Fields to Optional

Example Text formats

Proper	fred bassett => Fred Bassett
Lower	The Eiffel ToWER => the eiffel tower
Caps	rh1 1ta => RH1 1TA

Example Date Formats

dddd, dd MMMM yyyy HH:mm	Tuesday, 22 August 2006 15:20
ddd, d/M/yyyy h:mm tt	Wed, 8/1/2008 6:30 AM
yyyy'-MMMM'-dd HH'.mm 'GMT'	2009-Dec-13 09.10 GMT

Number Examples

{0:00}	123.565 => 123.57
{0:0,0.0}	56123.565 => 56,123.6
{0:0. #;10:0.0;zero}	0 => zero
	1234.33 => 1234.3
	-7652.64 => -7652.64
{0: +## # ## # ## #}	+44 7 900 123 456

Further examples of formats available in user documentation.

Submit Cancel

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To amend the formatting or required field, do the following:-

1. Click on the field in question, it will be displayed beneath the grid.

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2. Update the Field Format and Field Mandatory field as required. Examples of formats are displayed at the bottom of the screen.
3. Click the [Update] button.

If you click the [Submit] button before the [Update] button, the field values will not be updated.

The formatted address field includes some specific processing to make each address row Proper case, the postcode field Caps and option all fields are optional. This allows 2 or 3 line addresses to be formatted correctly.

Press the [Submit] button to return to the Menu.

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Testing the Correspondence

Once you have defined the template contents, you will need to test the template prior to submitting it to Live. Depending on the template type, you will need to test the email, letter or both screens.

Email Test Screen

Test Email Content Template Name: Auto Send Request for more environment information

Subject Folder Merged: (EX0001) Mr Graham field called

To: gaf@fieldconsultancy.co.uk

CC:

BCC:

From: Test@TestEmail.co.uk

Subject: Re: EX0001 - More information required

Attachments:

Body: Hi Mr Graham Field,
We have been reviewing your support call, and have determined we need more information.

Could you provide with as much of the following as possible:-

Server OS including Service pack
Server Database version
Server IIS version
Server Metastorm Version including any hot fixes

Client OS including service pack
Client Browser version

Could you provide with more information regarding the circumstances of your support call.

Thanks in anticipation

Graham Field
Support Analyst

Product: Correspondence Template
Problem: The HtmlEditor window keeps going blank

Select a record to use for the data merge. The first record is used by default.

Subject Contains:

Ref	Subject
EX0001	Mr Graham field called

Merge Results

Merge Selected Record

Starting Correspondence
Merge: 04/03/2010 12:49:38
Type: Email Source
Table: corCorrespondenceExample
FolderID: 00000000000000000000000000000000
029
Build Email
Email Merge Successful
Starting 04/03/2010 12:49:39 Using Email Template
Template data Loaded
found 7 merge Fields
Using Folder: EX0001

Merge Successful

Send Test Email

Return to Edit Mode

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The test screens, initially loads the last folder for the map associated with the Template and performs a merge. All the fields are loaded with the merged values. It may not be appropriate for that record and there may be empty fields. The screen above is a text email, for HTML emails, the text will be merged and displayed as HTML.

The Merge Status, highlighted above, shows if the Merge was successful. If not successful, the Merge Results box provides a detailed analysis of what the merge process did. The usual error is a field empty.

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There is grid with the last 10 folders of the associated map. To remerge with one these records, click the row and press the [Merge Selected Record] button. The screen will refresh with the details from the selected folder merged into the email. If you have a specific type of folder you wish to merge, then you can use the 'Subject Contains' field to get the top 10 folders with that text in the subject line.

Best practices suggests that several folders are selected and merged to ensure different combinations of fields work successfully. You may wish to enter a test folder with large values in the relevant fields to determine the effect on the template.

Letter Test Screen

The Letter Test Screen works the same as the Email Test screen except you can request the creation of a PDF and Open that PDF.

Submitting the Template

Once the Template has been tested successfully, it can be submitted for authorisation. Click on the 'Submit' button on the 'Correspondence Template Content' screen. This will only appear once all the screens associated with this template have been submitted included the test form.

Once you have confirmed the check screen, the template will be submitted for authorisation.

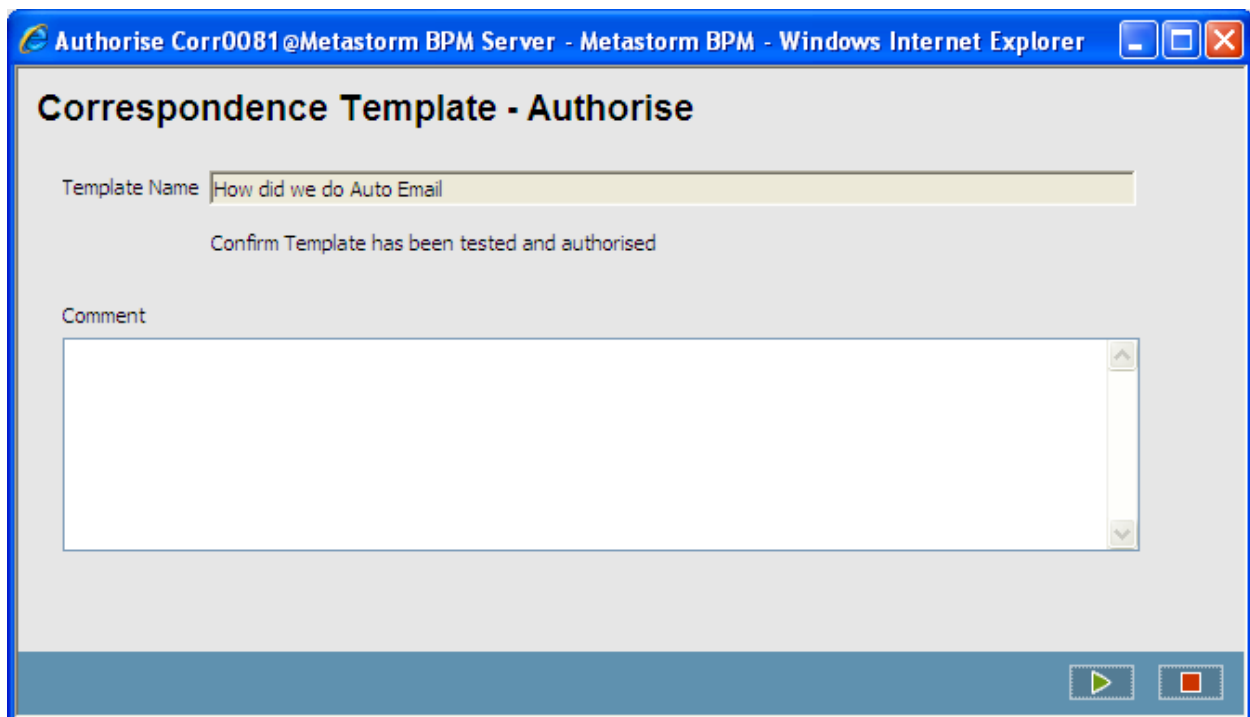
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Authorising the Template

The template Authoriser will receive requests to authorise a template into to Live (Available to processes to generate correspondence from).

The Authoriser is able to test tests for the template as above. When they are happy with the template, they click 'Authorise' action and optionally enter a comment which is saved as a note on the template.

The system takes a complete copy of the template and makes this copy available to the Live Correspondence generation. If a change is subsequently required, a copy of this live data is used to make the changes, so not affecting the live template until those changes are submitted.

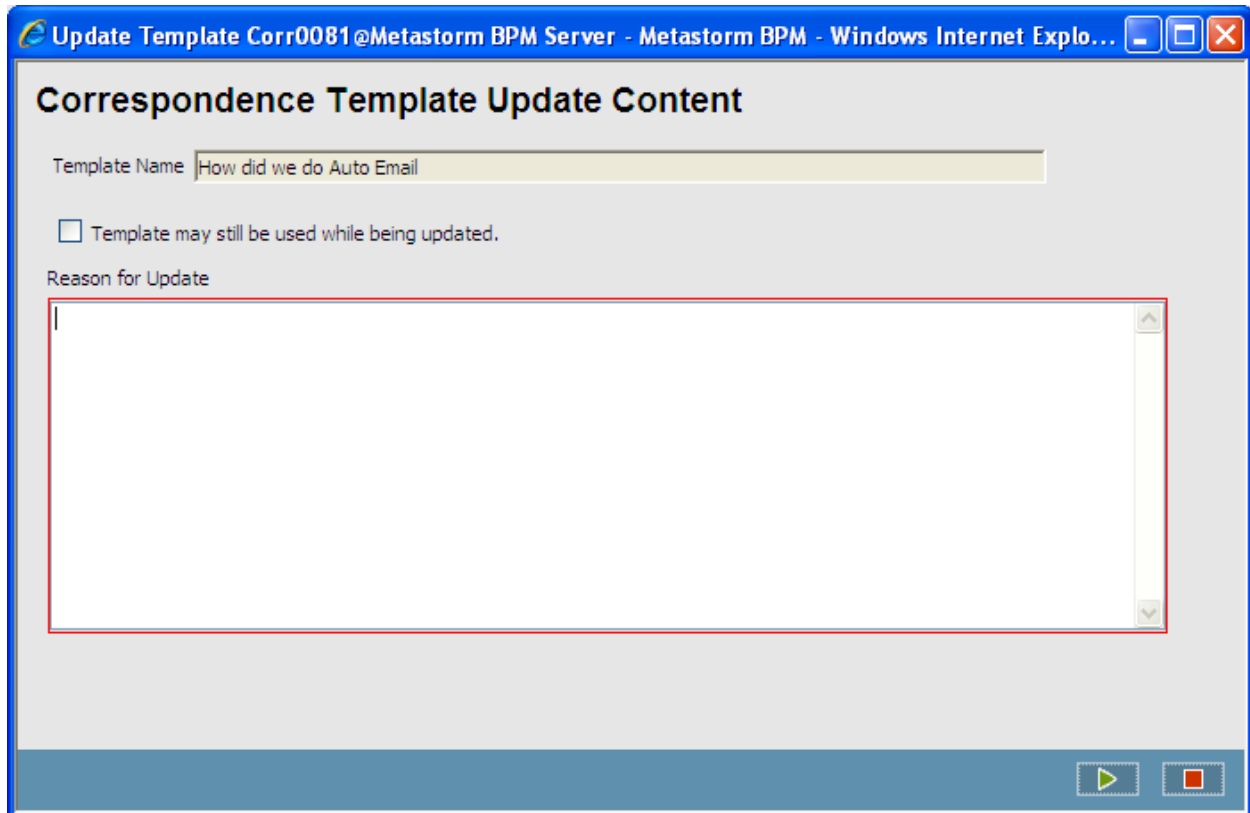


The screenshot shows a web browser window titled "Authorise Corr0081@Metastorm BPM Server - Metastorm BPM - Windows Internet Explorer". The main content area is titled "Correspondence Template - Authorise". It contains a text input field for "Template Name" with the value "How did we do Auto Email". Below this is a confirmation message: "Confirm Template has been tested and authorised". There is a "Comment" label followed by a large text area for entering a comment. At the bottom right of the form, there are two buttons: a green play button and a red stop button.

Updating a Template

When the Template has been made Live, you can request an update by selecting action 'Update Template'.

The screen requires that an amendment reason is added (and saved as a note). There is also a check box to allow the template to still be available in live while being updated. The live template values remain unchanged until the updates are authorised, which will overwrite the current Live template details.



The screenshot shows a web browser window titled "Update Template Corr0081@Metastorm BPM Server - Metastorm BPM - Windows Internet Explo...". The main heading of the form is "Correspondence Template Update Content". Below this, there is a text input field for "Template Name" containing the text "How did we do Auto Email". Underneath the input field is a checkbox labeled "Template may still be used while being updated.", which is currently unchecked. Below the checkbox is a label "Reason for Update" followed by a large, empty text area for input. At the bottom right of the form, there are two buttons: a green play button and a red square button.

Copying a template

One of the best ways to create a template is to copy from an existing template. This is also useful if some of the template configuration which can't be updated on the 'Edit Template Details' action.

Caution, if you are amending how the template is configured especially the Prefix and suffix values, these will not be updated in the copied template's details and must be replaced manually.

The Template name always has 'Copy of' prefixed to the template name. If this template is used from a select dropdown, then ensure the Template name isn't duplicated and that it will make sense to the User selecting the template.

On submitting the screen, a complete copy of the template will be created in Draft status.

Copy Template Corr0100@Metastorm BPM Server - Metastorm BPM - Windows Internet Explorer

Correspondence Template - Copy Template

After copying the template, please review all the control values for the nex template and the merge fields match your requirements.

Template Name

Long Description

Corres Group

1) Correspondence Type

Corres Type Template Type

Field Prefix Suffix These values are used by the system to create pieces of unique text which can be replaced by Field content or standard paragraphs. They may be different if the correspondence uses HTML.

Paragraph Prefix Suffix

2) Related Source Folder

Map Name Table Name

Used to determine which template(s) to use in your process, associate the template with any of the following

With Key with Stage with Action

3) Delivery Method

Specify if this Correspondence will be available as a Letter and or Email. If Letter, specify if it is to be printed in house or outsourced.

Delivery Method Auto Send Email

Auto Print Letter

4) Language

A separate template is required for each language if the same letter is to be provided in more than one language.

Language Currency Symbol Date Format

Time Format Number Format

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Correspondence Configuration

Correspondence Type

The correspondence type defines what kind of content you wish to build the correspondence with. The standard set of Correspondence Types should have been added to the system as part of the install process.

There are 3 types of template currently supported by the Correspondence POD

- Email** Create HTML or Text based emails
- Letter** Create HTML, Text or PDF documents. PDF documents are generated from HTML. Letters include a special Formatted Address, which automatically formats the address for posting.
- Email/Letter** Define a Letter, which is attached to an email and sent.

Based on the type of template you can define the format of the main body's content.

There are 3 types:-

- Text** Enter plain text to create text emails or text documents.
- HTML** Using the HTML editor, create HTML documents or HTML email content. The HTML document can be converted to PDF, which may be printed. The HTML editor provides general HTML editing.
- RAW Html** For Marketing quality emails, which include stylesheets and javascripts, build the email content in a separate professional HTML builder i.e. CS3, then copy that HTML into the template.

The most important part of the correspondence Type is the prefix and suffix fields. To achieve the paragraph and field merging, a set of characters are used i.e. { } for Paragraphs and [] for fields. Depending on the content of your template, you may need to change these characters e.g. you are sending a letter with some source code which may include the text 'record[0]'. This will cause the merge process to try to find field '0', which don't exist. If there is a possibility that the template includes these characters, the prefix and suffix characters can be changed to any up to 3 character value. i.e. '~#', '%%%' or '#'. When testing your template, try to enter appropriate data, so these problems are identified. For HTML, do not use '<' or '>'. The test screen highlights these issues to allow you to resolve them prior to moving the template to the Live environment.

In the Screen below, you can also change the Name and Display Order. If you don't want a correspondence type define to no longer be available, set the Display Order to -1, and it will no longer be displayed.

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Correspondence Type (corCorrespondenceAdmin@Metastorm BPM Server) - Metastorm BPM form - Windows Internet Explorer

Correspondence Admin

Correspondence Type

Correspondence

Templates

New Template

Components

Standard Paragraphs

Configuration

Delivery Method

Correspondence Type

Other Configuration

Exit

Name	Order	Template	Text	HTML	Raw HTML	Field Prefix	Field Suffix	Para Prefix	Para Suffix
HTML Email	2	Email	No	Yes	No	[]	[]	{ }	{ }
HTML Document	3	Letter	No	Yes	No	[]	[]	{ }	{ }
PDF Document	6	Letter	No	Yes	No	[]	[]	{ }	{ }
PDF via Email	7	EmailLetter	No	Yes	No	[]	[]	{ }	{ }
RAW HTML Email	8	Email	No	No	Yes	~#	#~	~	~
Text Email	10	Email	Yes	No	No	[]	[]	{ }	{ }
Text Document	12	Letter	Yes	No	No	[]	[]	{ }	{ }

The Correspondence Type is used to control the components used to make up the correspondence. The table is validated on submit to ensure all the combinations of fields are valid. Below are the general rules about permissible combinations.

Correspondence can be only one format i.e. text or HTML or Raw HTML. Only email supports Raw HTML.

PDF letters and documents are generated from HTML.

Depending on the document format, adjust the Field and Paragraph suffix and prefix values so they do not interfere with the composition of the template. i.e. for HTML avoid < and >.

To insert a row, place the cursor on a row and press the 'Insert' key.
To delete a row, update the DisplayOrder field to -1.

Save

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To insert a new row, place the cursor in the grid and press the [Insert] key. You must complete a value in every column. There are dropdowns to assist in completing the record.

Once you have completed the changes, click the [Save] button, or move to another option.

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Delivery Method

Depending on the template type (Email, Letter or Email Letter), you can define what happens to the newly created correspondence. The options are:-

- Req Address** The template will ensure the Formatted Address value isn't empty when building the letter.
- Req Email** For emails, ensure the Email To and Email from fields have values.
- Auto Send** Once the Email correspondence has been created, the Correspondence POD will automatically send the email without any further user/system interaction.
- Auto Print** Once the PDF Letter/Document has been created, it can be printed to a printer defined on the Metastorm BPM engine server. This option only works with HTML to PDF documents.

The description and names can be updated and the order they appear in the dropdown.

The screenshot shows the 'Correspondence Admin' web application in a Windows Internet Explorer browser window. The title bar reads 'Delivery Method (corCorrespondenceAdmin@Metastorm BPM Server) - Metastorm BPM form - Windows Internet Explorer'. The main heading is 'Correspondence Admin'. Below it is a section titled 'Correspondence Delivery Method'. On the left, there are two main sections: 'Correspondence' with buttons for 'Templates' and 'New Template', and 'Components' with a button for 'Standard Paragraphs'. Below these is a 'Configuration' section with buttons for 'Delivery Method', 'Correspondence Type', 'Other Configuration', and 'Exit'. The main area contains a table with 9 columns: Name, Order, Description, Template, Req Address, Req Email, Auto Send, and Auto Print. The table lists 8 delivery methods. Below the table is a scrollable text area with instructions: 'Delivery Method used to control what actions should occur once the email, document has been created. i.e. Auto send or wait until reviewed.', 'Emails should ensure the Email Fields are completed.', 'Letters require a Formatted Address to be have a value.', 'Documents do not need to have a valid Formatted Address field.', 'To insert a row, place the cursor on a row and press the 'Insert' key.', and 'To delete a row, update the DisplayOrder field to -1.' At the bottom right is a 'Save' button. The footer shows 'Version 1.0', 'Licensed To Evaluation', and 'License 04HK-LV10-NTCF-BT01'.

Name	Order	Description	Template	Req Address	Req Email	Auto Send	Auto Print
Auto Send Email	1	Auto Send Email	Email	No	Yes	Yes	No
PDF Letter on Email	2	PDF Letter from HTML and sent attached to	EmailLetter	Yes	Yes	Yes	No
Review Email prior to Send	3	Review Email content prior to sending	Email	No	Yes	No	No
Review Document prior to Print	4	Create HTML Document and allow edit prior to	Letter	No	No	No	No
Review Letter prior to Printing	5	Create HTML Letter and allow edit before pri	Letter	Yes	No	No	No
Create PDF Document and Au	8	Create PDF Document from HTML and Print	Letter	No	No	No	Yes
Create PDF Letter and Auto P	8	Create PDF Letter from HTML and Print	Letter	Yes	No	No	Yes